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Appendix C - SDN Enrollment

If you do not already have a Secure Data Network (SDN) digital certificate for exchanging data with CDC, check with your program manager, CDC SDN Support, or VACMAN Support for assistance.

Your program manager can identify up to three people at your project to receive data from, and transmit data to, CDC. These three people request SDN digital certificates with access to your project's VACMAN SDN activity.

CDC SDN Technical Support		CDC VACMAN Help Desk	
Phone:	800-532-9929	**Phone:**	400-639-8303
	(770-216-1276 in Atlanta)	**Fax:**	404-639-8445
Email:	cdcsdn@cdc.gov	**Email:**	vacman@cdc.gov
		Web:	http://www.cdc.gov/nip/vacman

Before You Begin

Please read this entire section before you apply for your digital certificate. If you are a Netscape user, please note the additional Netscape instructions below.

Note: The following information is provided by CDC SDN Technical Support.

Your technical or network support staff knows your local system better than anyone at SDN support will know it, and they need to be made aware of ANY changes you are making to your system. It is a good idea to speak to them before contacting SDN support, or to have them on the line, or otherwise in the loop when speaking to SDN support, to resolve any conflicts which may occur between your system and the digital certificate. They are also better able to assist you with local issues, such as updating your browser or operating system or installing service packs or patches. If possible, please provide SDN support with the name of a technical or network support person who is responsible for your area, in case issues need to be resolved at your location before you can install or use a digital ID.

Note: You will be adding a component to your browser which may or may not have an impact on your local computer setup, or which can be affected by your local setup or by changes made to your local computer or network after installation. It is advisable that you make your technical or network support personnel aware of this BEFORE you proceed with the application. We recommend you forward a copy of this documentation to your support personnel or present them with a printed copy.

Please report the following to your network or technical support personnel:

1. Tell them you need to make a secure socket layer (SSL) connection using port 443, and in some instances may need access to port 4430. Any network or firewall configuration which restricts access to port 443 might prevent you from completing the process. Some programs require 128-bit encryption for records requiring that the privacy of the patient or study participant be protected.

   The latest versions of **Internet Explorer (5.5 and up)** and **Netscape (6.0 and up)** are capable of this level of encryption.

   ### Netscape Users:

   - For Netscape version 6.0 and up, you also must install Sun Java JRE version 1.3.1. For more information, see “Computer Specifications,” Chapter 1.
   - For Netscape version 4.7 and below, you may need to specifically request an installation capable of this level of encryption.

2. Let your technical staff know that you need to install a non-executable item in your browser and therefore, you should be granted "Standard" or "Power" user rights which would allow you to make the necessary modifications to the browser. It is vital that these rights be granted before you begin the application process, as minor changes to your system may be attempted at any step and you will need these rights until you have successfully installed the certificate to your browser. If such rights are restricted on your network, it will be necessary for you to work with a systems administrator to complete this process.

   Note: Such rights are not necessary for everyday use of the certificate once it's installed -- only to install or renew it. Also, you will also need these rights if you wish to export a copy of your certificate to diskette. See below for more information on export/import.

3. If you are using Internet Explorer version 5.0 or above, be aware that Microsoft has made changes to the way their browsers handle certificates which may prevent you from completing the application or installing the certificate once you've been approved if your browser has not been updated. The latest service pack for Internet Explorer may or may not contain this update. Please refer to this link at Microsoft for more information and possible solutions:

   http://support.microsoft.com/default.aspx?scid=kb;en-us;323172

4. Let your network or mail administrators know that a note will be sent to you via email, usually within 24 hours of registration, containing an HTML link to a page which will allow you to retrieve your certificate, and containing other important information needed to retrieve your certificate. Some firewall or antivirus programs may interpret this link as a virus. If this is the case in your environment, please inform SDN support (cdcsdn@cdc.gov) right away so we can make arrangements to get you the information you will need to retrieve your certificate.

5. Make your tech support people aware that ANY changes to the browser, operating system, registry, network or domain following installation of the certificate, may affect how the certificate behaves and that they should alert you, if possible, before making such modifications. If your computers are about to be upgraded or replaced, it might be a good idea to wait until this has happened, if possible, before completing the application.

6. Ensure that the browser you normally use to access the Internet is also the DEFAULT browser on your system (that is, the browser that opens when you click a link in your email). Your technical support staff can assist you with this.

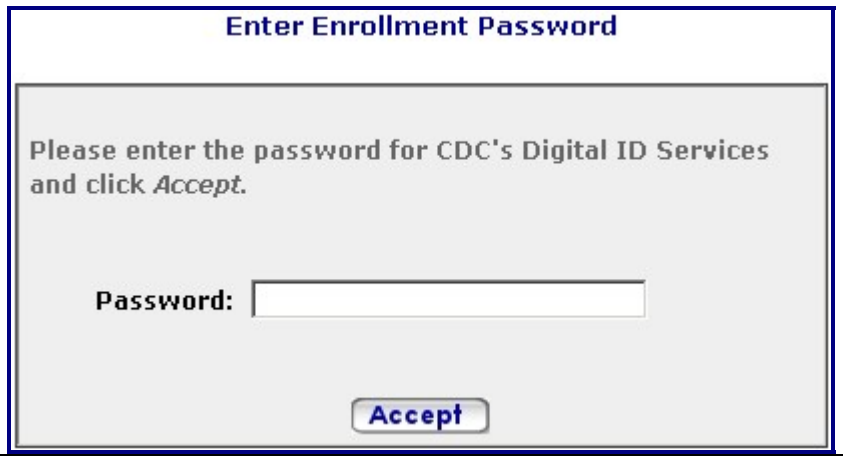
7. Knowing that even under the best of circumstances problems can still occur; it's STRONGLY advised that once you have installed your certificate you export a backup copy to a diskette which can be stored in a secure location. You should make your support staff aware of this as well as how to restore the certificate should it become corrupted or overwritten. For these instructions, send a note to cdcsdn@cdc.gov as soon as you've installed your certificate. As stated above, you will need the same sort of rights to export your certificate as you needed to install it. It is advisable you do this after you have confirmed you are able to access the SDN with your certificate.

Requesting Your SDN Certificate

Use these instructions to request an SDN certificate.

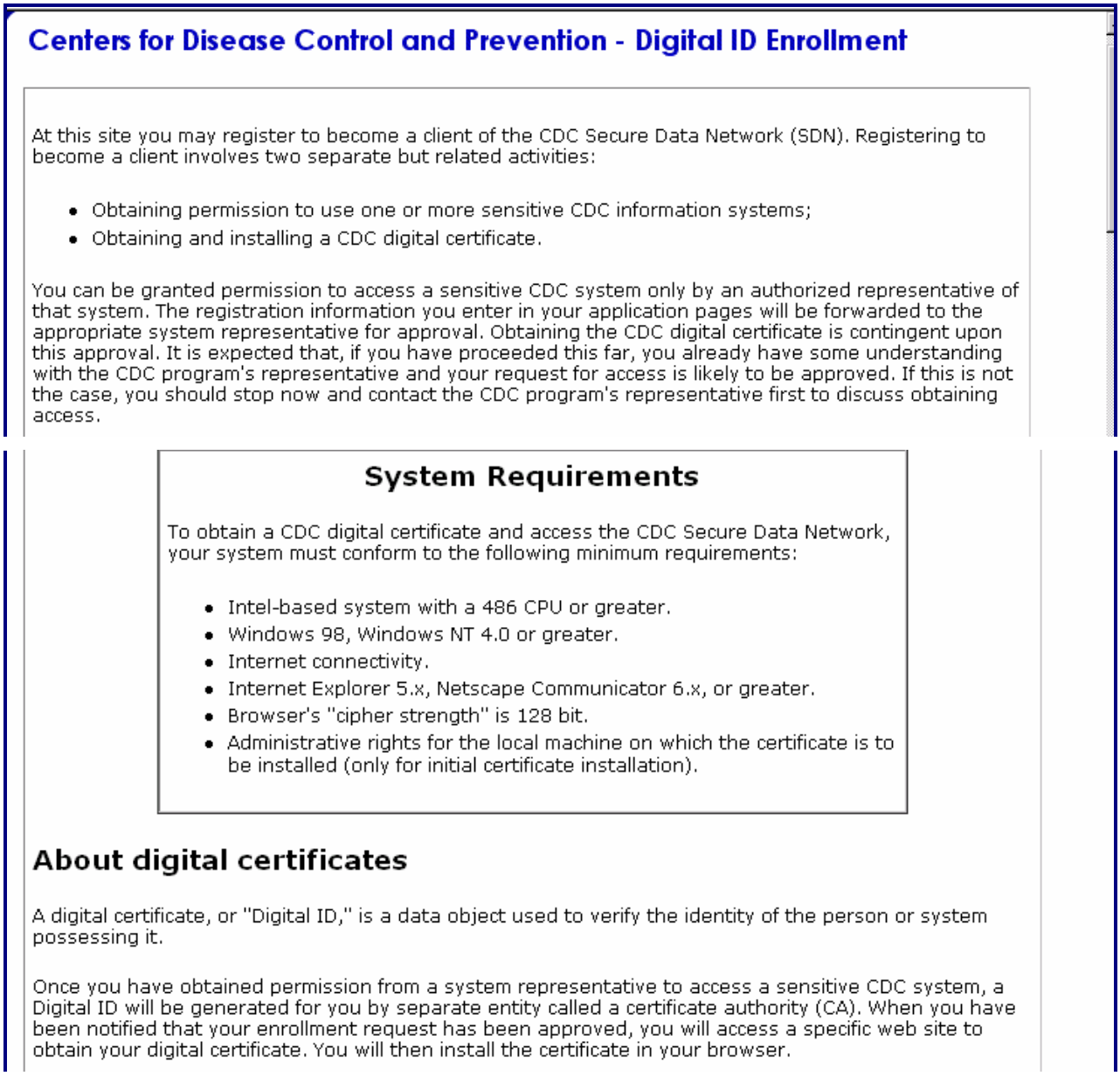
Prerequisites

- Obtain your initial SDN password from your project manager.
- Request your certificate at the computer workstation from which you will perform exchanges with CDC. **The SDN certificate is associated with both your user ID and your computer.**
- See "Before You Begin," previous pages.

Step	Action
1	Access the SDN enrollment website at this Uniform Resource Locator (URL): https://ca.cdc.gov **Result:** The system accesses the internet, and displays the *Secure Data Network – Enrollment – Microsoft Internet Explorer – provided by National Immunization Program - Enter Enrollment Password* screen. **Figure App. C - 1. SDN - Enter Enrollment Password screen.** 
2	On the SDN *Enter Enrollment Password* screen, type the initial registration password, then click the **Accept** button. **Note:** For security reasons, the initial registration password cannot be provided in this document, nor can it be provided by CDC SDN Support. Only your project manager can provide this information. **Result:** The system displays a *Requirements* page providing general information about digital certificates and terms of use. The next two pages, Figure App. C - 2, duplicate this information. **Note:** Issuance and use of a digital certificate from VeriSign® is governed by the VeriSign Certification Practice Statement (CPS) and Digital ID Subscriber Agreement. For information regarding the CPS or Agreement, go to the VeriSign website at: www.verisign.com/repository

Requesting Your SDN Certificate (continued)

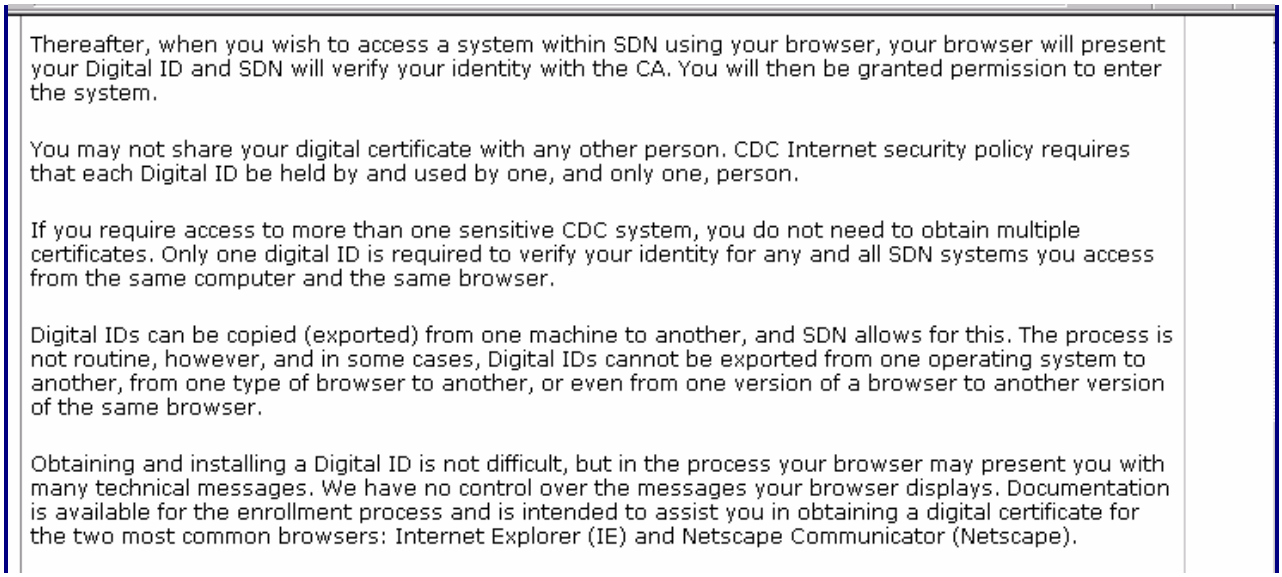
Figure App. C - 2. SDN – Centers for Disease Control and Prevention – Digital ID Enrollment screen.



(Continued next page)

Requesting Your SDN Certificate (continued)

SDN – Centers for Disease Control and Prevention – Digital ID Enrollment screen (Figure App. C-2 continued).



Thereafter, when you wish to access a system within SDN using your browser, your browser will present your Digital ID and SDN will verify your identity with the CA. You will then be granted permission to enter the system.

You may not share your digital certificate with any other person. CDC Internet security policy requires that each Digital ID be held by and used by one, and only one, person.

If you require access to more than one sensitive CDC system, you do not need to obtain multiple certificates. Only one digital ID is required to verify your identity for any and all SDN systems you access from the same computer and the same browser.

Digital IDs can be copied (exported) from one machine to another, and SDN allows for this. The process is not routine, however, and in some cases, Digital IDs cannot be exported from one operating system to another, from one type of browser to another, or even from one version of a browser to another version of the same browser.

Obtaining and installing a Digital ID is not difficult, but in the process your browser may present you with many technical messages. We have no control over the messages your browser displays. Documentation is available for the enrollment process and is intended to assist you in obtaining a digital certificate for the two most common browsers: Internet Explorer (IE) and Netscape Communicator (Netscape).

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Obtaining and installing a Digital ID is not difficult, but in the process your browser may present you with many technical messages. We have no control over the messages your browser displays. Documentation is available for the enrollment process and is intended to assist you in obtaining a digital certificate for the two most common browsers: Internet Explorer (IE) and Netscape Communicator (Netscape).

Digital ID Subscriber Agreement

The issuance of Digital IDs through this system is governed by the Verisign Certification Practice Statement (CPS). By applying for, accepting, or using a Digital ID through this system, you are agreeing to the terms of the Verisign Subscriber Agreement ("Agreement"). By clicking the *Enroll* button below, you indicate your acceptance of this agreement. If you do not agree to the terms of this agreement, you should not complete this application process, or use the Digital ID.

Complete terms for the VeriSign CPS and Digital ID Subscriber Agreement can be found **here.**

To enroll for a CDC Secure Data Network Digital ID, click here: Enroll

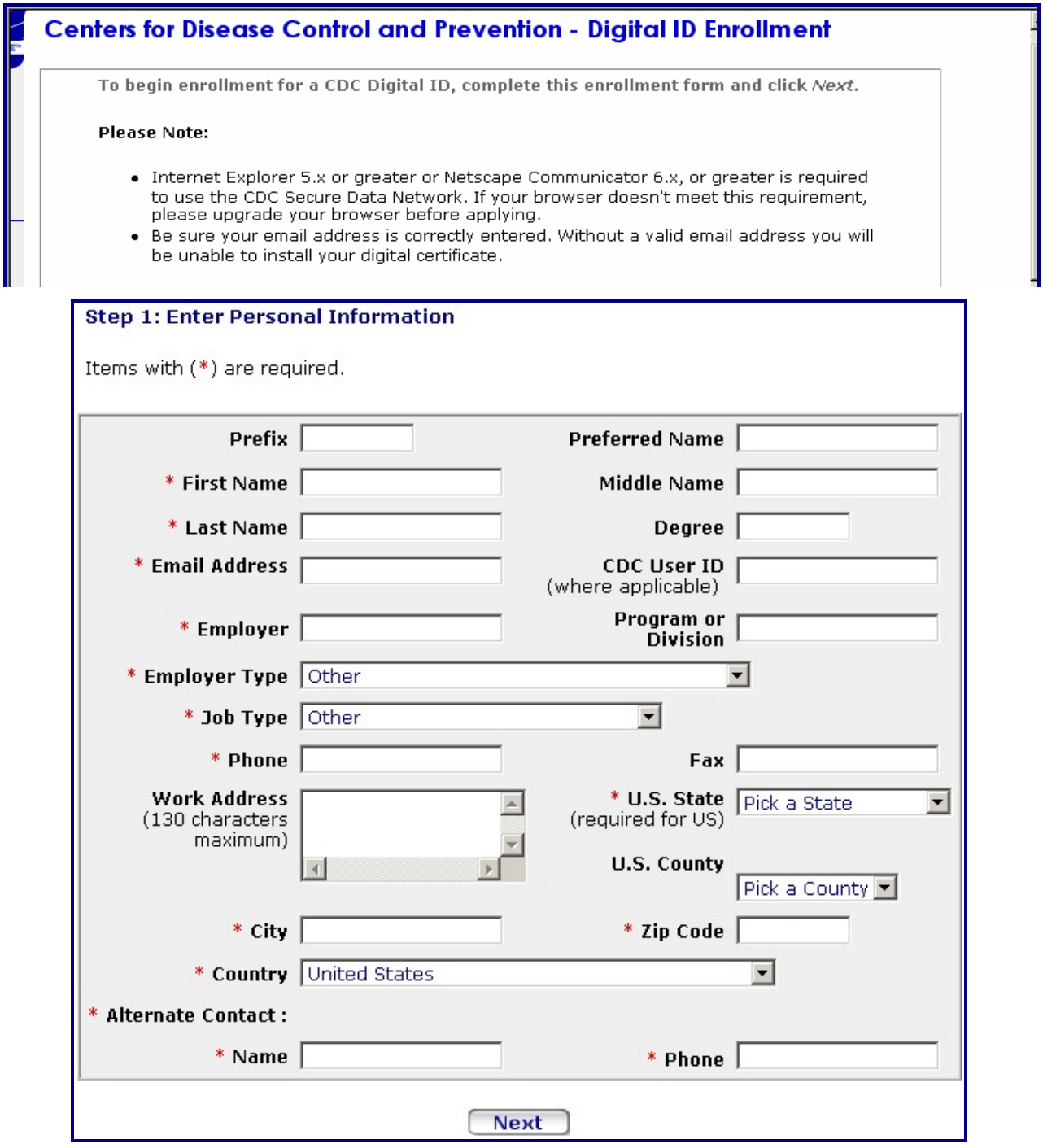
Questions? Go to the Online Help or Contact SDN Support

This page last reviewed Mar 14 2003

Requesting Your SDN Certificate (continued)

Step	Action
3	On the SDN CDC *Digital ID Enrollment* screen, Figure App. C - 2, review the requirements and terms, then click the **Enroll** button. **Result:** The system displays the SDN *CDC Digital ID Enrollment - Enter Personal Information* screen, Figure App. C - 3.

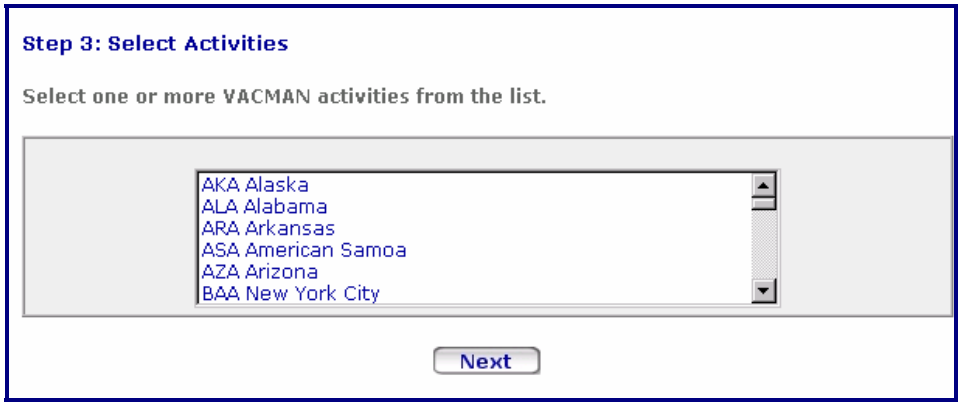
Figure App. C - 3. SDN - CDC Digital ID Enrollment - Enter Personal Information screen.



Requesting Your SDN Certificate (continued)

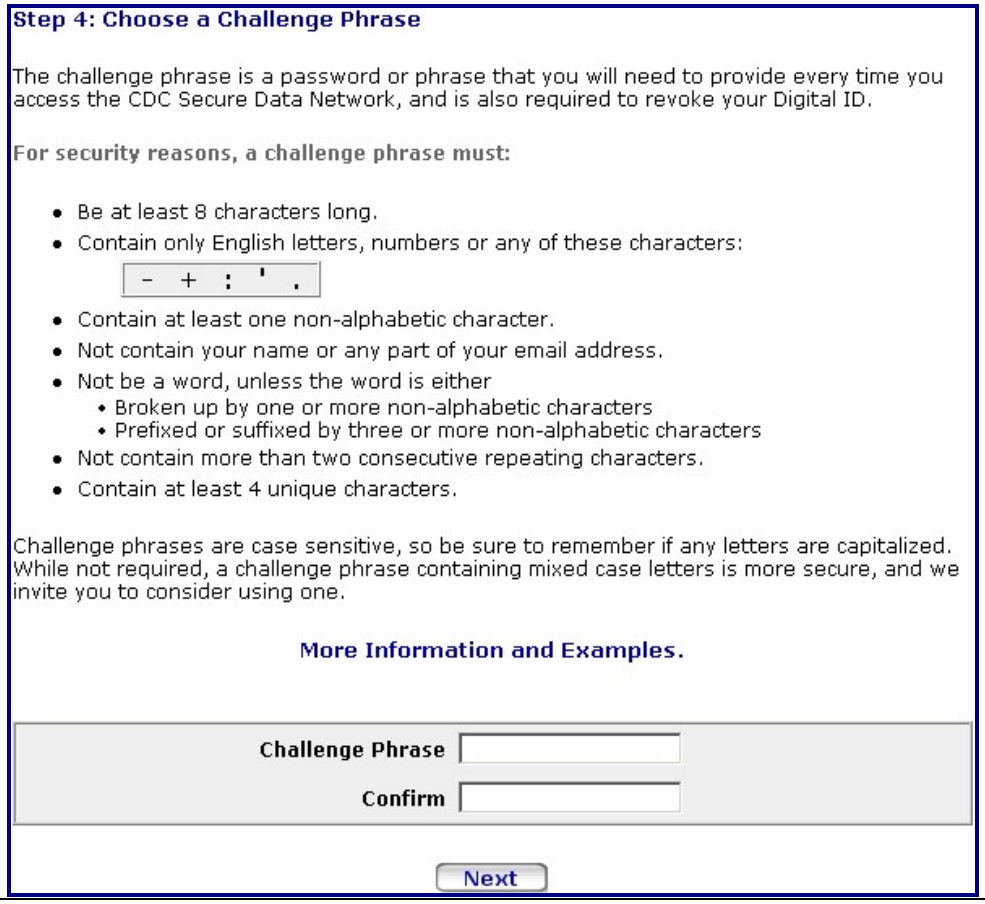
Step	Action
4	On the SDN *CDC Enter Personal Information* screen, Figure App. C - 3, type your personal information into the fields. Note that fields marked with asterisks (*) are required. When these entries are complete, click the **Next** button. **Result:** The system displays a *Microsoft Internet Explorer* dialog box, Figure App. C - 4, seeking confirmation of your email address. **Figure App. C - 4. MS Internet Explorer Email address confirmation screen.**
5	On the *Microsoft Internet Explorer* email address confirmation dialog box, Figure App. C - 4, ensure that the system is displaying your correct email address. This data is an important component of the enrollment process; your digital certificate will be sent to this email address. **Note:** If the address is not correct, click the **Cancel** button. The system re-displays the *Enter Personal Information* screen, where you can re-type your email address. See the previous step. If the email address is correct, click the **OK** button. **Result:** The system displays two screens: the *Select A Program* screen, and the *Select Activities* screen. The *Select A Program* screen, Figure App. C - 5, is at the top. **Figure App. C - 5. Select A Program screen.**

Requesting Your SDN Certificate (continued)

Step	Action
6	a) On the *Select A Program* screen, Figure App. C - 5, scroll to and select **VACMAN**. b) On the *Select Activities* screen, Figure App. C - 6, scroll to and select your VACMAN project. c) On the *Select Activities* screen, Figure App. C - 6, click the **Next** button. **Figure App. C - 6. Select Activities screen.**  **Note:** During initial enrollment, you can select only one program from the available list. If you require access to more than one program, first select the program identified by the program administrator who extended the enrollment invitation. After your digital certificate has been issued and you access SDN, you can request additional programs and activities. It is not necessary to apply for additional digital certificates. Once you can access SDN, if you need to request multiple programs, use the following keyboard techniques: • To select multiple, non-consecutive rows: press and hold the **Ctrl** key, and simultaneously click each row you need • To select multiple, consecutive rows: press and hold the **Shift** key, and simultaneously click the first and last row you need **Result:** The system displays the SDN - *CDC Choose a Challenge Phrase* screen, Figure App. C - 7.

Requesting Your SDN Certificate (continued)

Step	Action
6 **cont.**	**Figure App. C - 7. SDN – CDC Choose a Challenge Phrase screen.**



Requesting Your SDN Certificate (continued)

Step	Action
7	On the *Choose a Challenge Phrase* screen, Figure App. C - 7, review the requirements for the challenge phrase. The challenge phrase functions similarly to a password. For security reasons, considerable complexity is required. Especially note the following: • The challenge phrase is case-sensitive. If you experience difficulty, check your keyboard **Caps Lock** key. Although it is not a requirement, a combination of upper and lower case letters is a good security measure. **Example:** ChaL+lenGe • The challenge phrase must contain at least one non-alphabetic character. It can be a number, or any of the following keyboard characters: **Character** — **Description** - — Minus sign, or hyphen, key (not underline key) + — Plus sign : — Colon ' — Apostrophe . — Period • The challenge phrase cannot contain an unbroken actual word, or your name, or any part of your email address. • The challenge phrase must contain at least eight characters. The screen presents all of the challenge phrase criteria; review this information carefully. It also provides a link to examples of challenge phrases. Make a note of the challenge phrase you choose, and store it in a secure location. The VACMAN team recommends that you record this information on the VACMAN *Add/Modify Users* screen. Type your *Challenge Phrase* in both fields at the bottom of the screen; the keystrokes must match identically. Then click the **Next** button. **Result:** The system validates your challenge phrase, then displays the SDN *CDC Digital Certificate Request Received* screen, Figure App. C - 8. The screen acknowledges receipt of your request, and notifies you that an email will provide additional instructions.

Requesting Your SDN Certificate (continued)

Step	Action
7 **cont.**	**Figure App. C - 8. SDN – CDC Digital Certificate Request Received screen.**
8	On the *Secure Data Network – Enrollment – Microsoft Internet Explorer – provided by National Immunization Program – Digital Certificate Request Received* screen, click the **close screen** button in the top right corner of this internet screen. **Result:** The system closes the screen. You SDN enrollment request is complete. CDC SDN Technical Support will send further instructions via email.
9	Go to the next topic, “Obtaining Your SDN Certificate.”

Obtaining Your SDN Certificate

Use these instructions to obtain your SDN certificate.

Prerequisites

- You must have requested an SDN digital certificate, and received an email message from CDC SDN Technical Support with specific instructions for obtaining it.
- See "Before You Begin," at the beginning of this "SDN Enrollment" section.

Step	Action
1	Access the SDN enrollment website via the link provided in your email notification from CDC SDN Technical Support. The following is sample of this email.

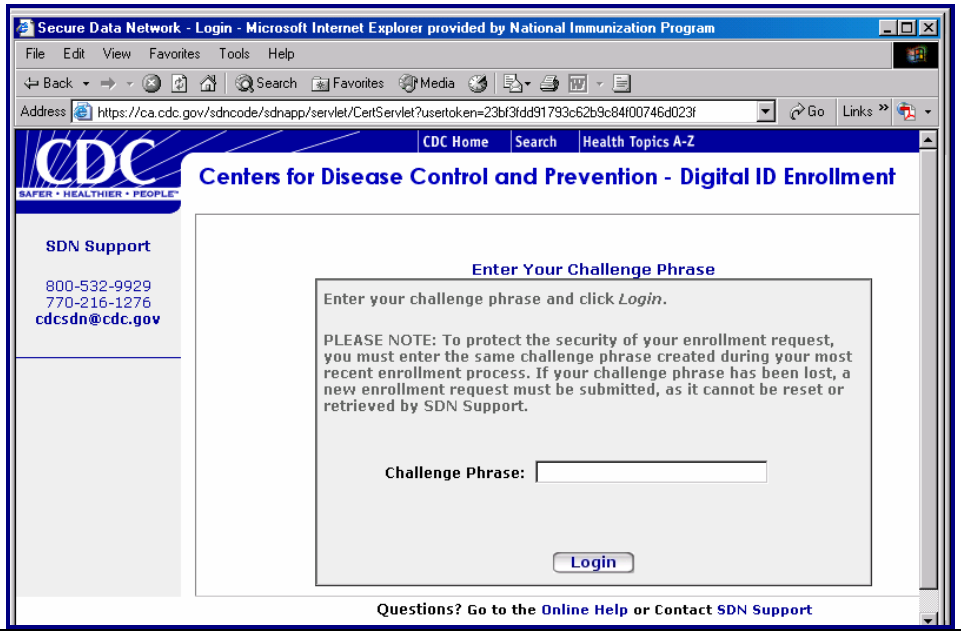
Figure App. C - 9. SDN Enrollment Approved sample email message.

```
From: CDC SDN Support [cdcsdn@cdc.gov]
Sent: Wednesday, March 26, 2003 3:58 PM
To: John Doe
Subject: SDN Enrollment Approved

The administrator has approved your SDN enrollment request. Go to the following
URL to obtain your digital certificate:

https://ca.cdc.gov/servlet/CertServlet?usertoken=387818:f42ece9805:-7ffd
```

Either click on the link provided in the message, or copy the link and paste it into your browser.

Result: Upon access, the system displays the *Secure Data Network – Login – Microsoft Internet Explorer provided by National Immunization Program – Centers for Disease Control and Prevention – Digital ID Enrollment - Challenge Phrase* screen, Figure App. C - 10.

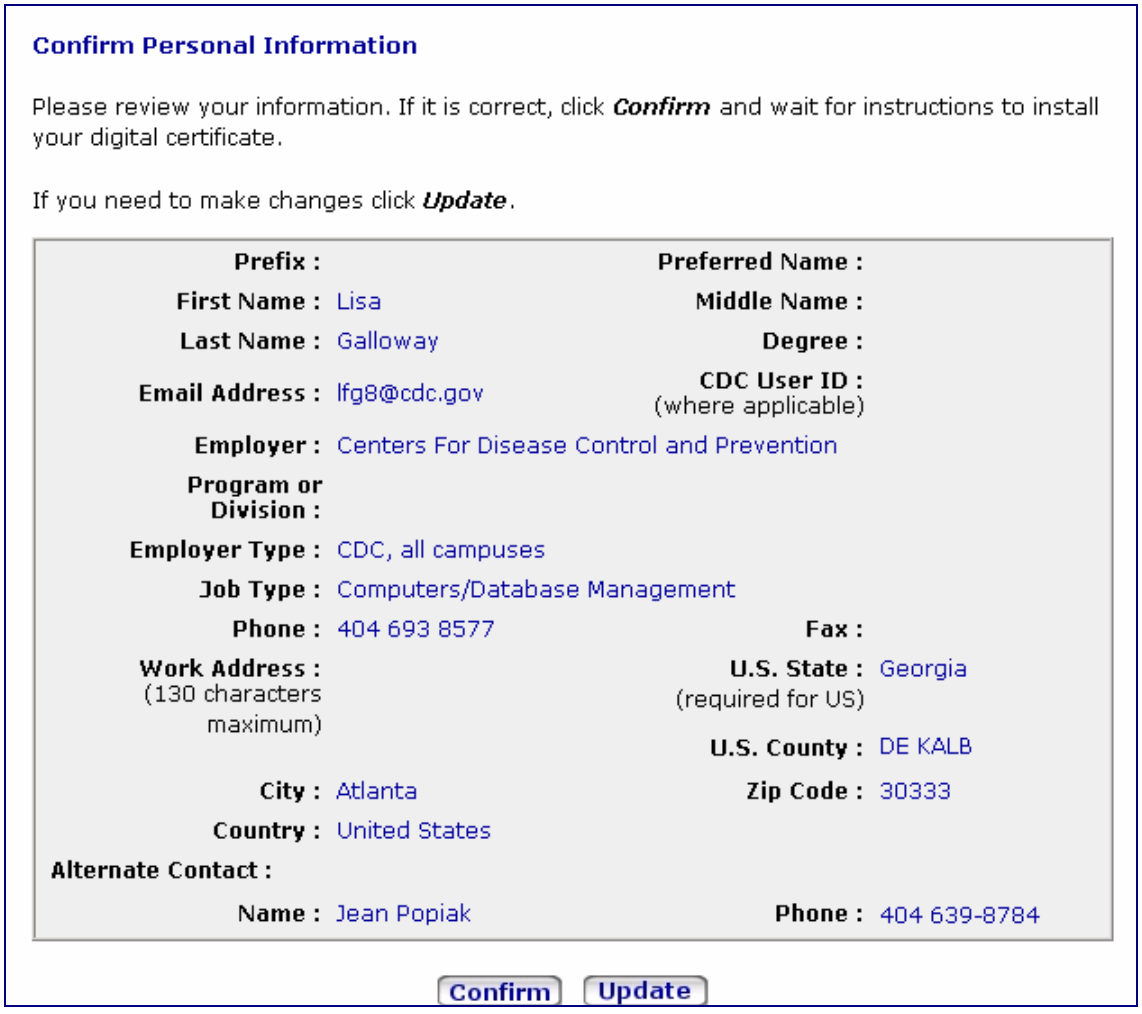
Figure App. C - 10. SDN Login - Digital ID Enrollment – Challenge Phrase screen.



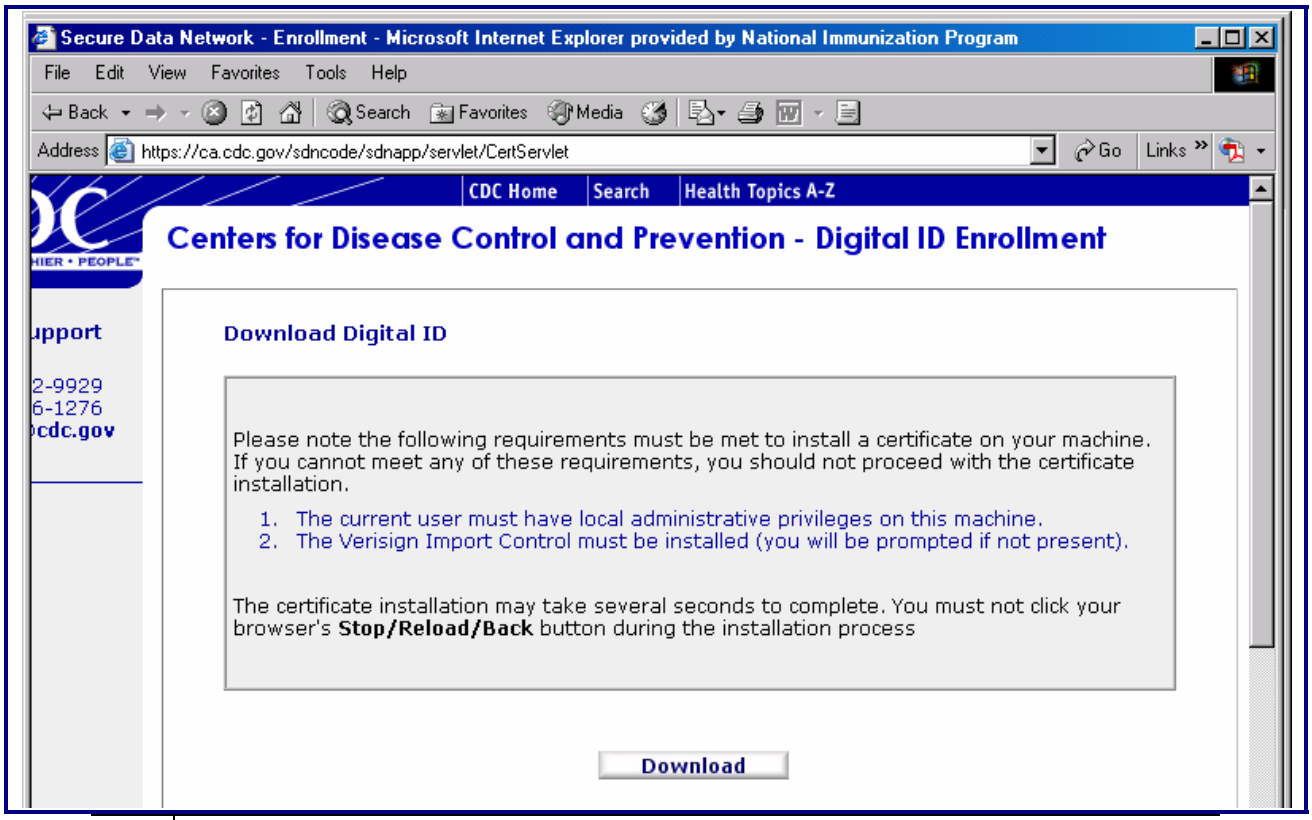
Obtaining Your SDN Certificate (continued)

Step	Action
2	On the SDN Login *Challenge Phrase* screen, Figure App. C - 10, type your challenge phrase. This is the challenge phrase you created when you requested your SDN certificate. After typing your challenge phrase, click the **Login** button. **Result:** The system verifies the challenge phrase, then displays the SDN *Confirm Personal Information* screen.

Figure App. C - 11. SDN – Confirm Personal Information screen.



Obtaining Your SDN Certificate (continued)

Step	Action
3	On the SDN *Confirm Personal Information* screen, Figure App. C - 11, review the information for accuracy. It is important that all information is correct before the digital certificate is issued. The information is permanently associated with the digital certificate itself. It can be changed only within SDN and is not reflected by the certificate. **Note:** You can correct or update this information as needed. If you modify information in any of the required (*) fields, the system displays the SDN *Personal Information Changes Received* screen, Figure App. C - 13. Note that in these cases, you will need to re-install your certificate. **Figure App. C - 12. SDN –Personal Information Changes Received screen.** If the information on the SDN *Confirm Personal Information* screen, Figure App. C - 11, is correct, click the **Confirm** button. **Result:** The system displays the SDN – CDC *Download Digital ID* screen. **Figure App. C - 13. SDN – CDC Download Digital ID screen.** 
4	Go to the Next topic, “Installing Your Digital Certificate.”

Installing Your SDN Certificate

Use these instructions to install your SDN certificate.

Before You Begin

After confirmation of the enrollment information, your browser will be directed automatically to begin creation of the digital certificate based on the type of browser being used.

- For Internet Explorer users, certificate generation and installation will be done automatically.
- For Netscape users, certificate generation will be done automatically, and instructions for the installation of the certificate will be provided.

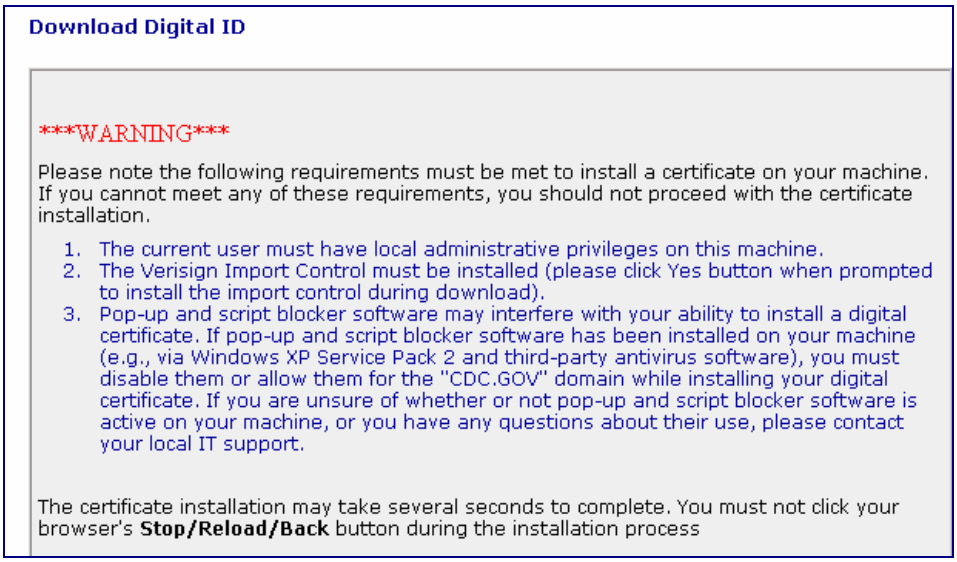
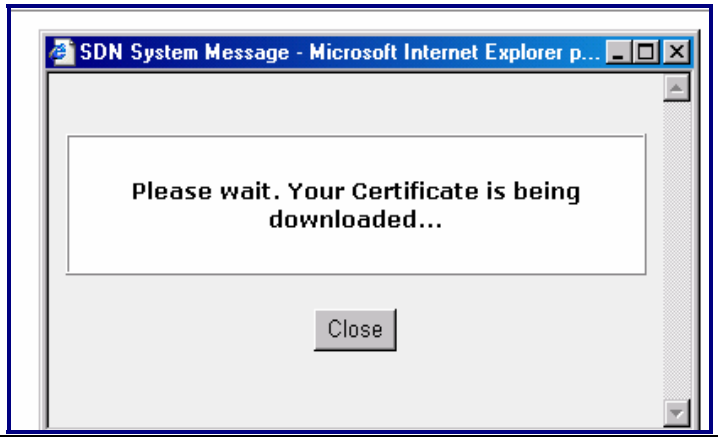
  For Netscape users, the installation instructions must be followed as specified due to the fact that the certificate will not install automatically.

If the generation or installation of the certificate fails, and you are unable to obtain your digital certificate using your current enrollment request, contact SDN Support or your program administrator for assistance.

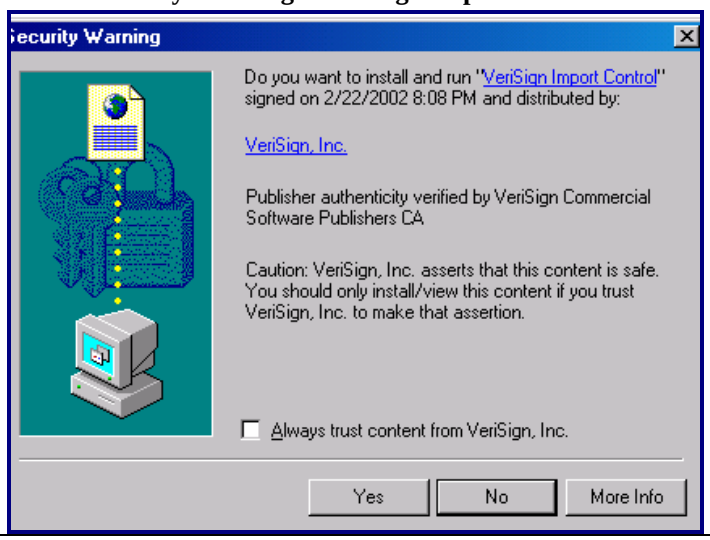
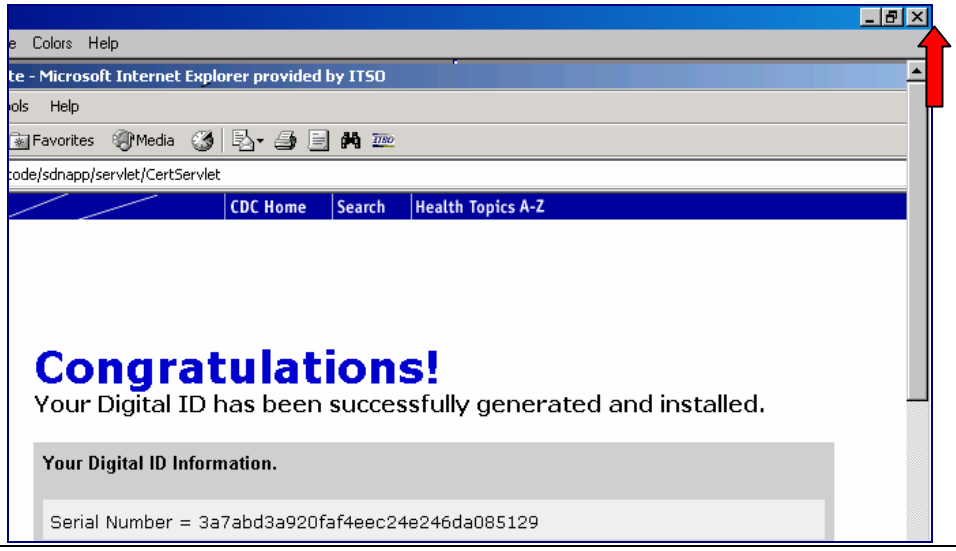
Prerequisites

- You must have obtained your SDN digital ID certificate. See the previous topic, “Obtaining your SDN Certificate.”
- You must have local administrative rights on your machine to install the certificate.
- You must have Verisign Import Control on your machine. If you previously had an SDN certificate on your computer, you should have this software. Otherwise, click the **Yes** button when prompted, during the certificate download, to install the Verisign Import Control function.
- If you have pop-up and script blocker software on your computer, you need to allow them for the “CDC.GOV” domain while installing your certificate. Contact your IT staff or the VACMAN Help Desk for further information.
- See “Before You Begin,” at the beginning of this “SDN Enrollment” section.

Installing Your SDN Certificate (continued)

Step	Action
1	On the SDN *CDC Download Digital ID* screen, Figure App. C - 14, read the requirements, then click the **Download** button. **Figure App. C - 14. SDN – CDC Download Digital ID screen, Install process.**  **Result:** The system displays an *SDN System Message* indicating that your certificate is being downloaded. **Figure App. C - 15. SDN System Message screen.** 
2	On the *SDN System Message* screen, click the **Close** Button. **Result:** The system accesses the *Security Warning - VeriSign Import Control* screen, Figure App. C - 16.

Installing Your SDN Certificate (continued)

Step	Action
2 **cont.**	**Figure App. C - 16. Security Warning - VeriSign Import Control screen.** 
3	On the *Security Warning - VeriSign Import Control* screen, Figure App. C - 16, click the **Yes** button. **Result:** The system installs the software, then displays the SDN *Digital ID Installation Complete – Congratulations!* screen. **Figure App. C - 17. SDN - Digital ID Installation Complete – Congratulations! screen.** 
4	Click the **close screen** button at the top right corner of the internet screen. **Result:** Your digital certificate is installed. The system closes your connection with the SDN. You can perform the VACMAN system Exchange function by entering your challenge phrase when you log in to SDN.
5	The VACMAN team recommends that you make a backup copy of your certificate. If you move to, or receive, a different computer, you can install the certificate on it. For instructions on how to do this, email cdcsdn@cdc.gov and request instructions for backing up your SDN certificates.